

ProjectWise Deliverables Management

EDG QA Check Workflow

Organization = Company registered with Bentley

Transmittal = Data sent outside of organization (Outgoing)

RFI= Request For Information

Submittal = Data received into an organization (Incoming)

Participants = Someone assigned to a project. Can be an internal or external participant

Draft = A partially completed package that can be edited prior to being transmitted

Package = Proposed set of documents being transmitted or submitted

Reminder: The sending user issues a *Transmittal*, and the receiving user receives a *Submittal*.

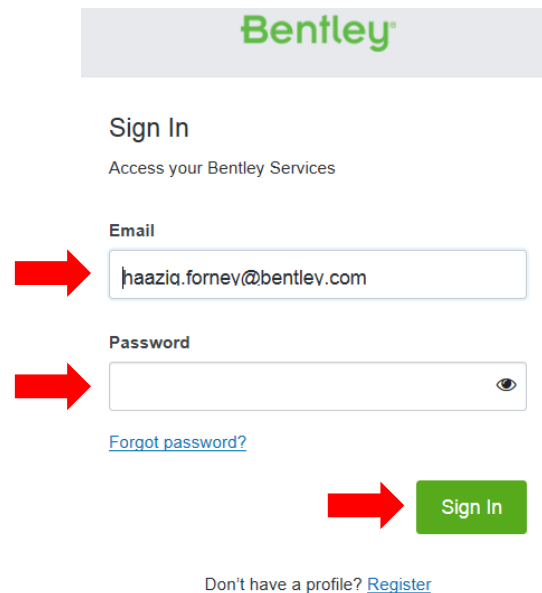
Submission of DGN files and PDF files required for the EDG QA Check will be initiated by the Design Consultant. Use of ProjectWise Deliverables Management (PWDM) for submission of files is required. This will be a separate submission than the PFPR submission.

External Participants – Creating/Issuing Submittals for EDG QA Check (Web Portal)

1. To access Bentley's Web portal go to <https://connect.bentley.com/>

If you already have a Bentley account and have accepted an invitation to participate on a project:

- a. Enter your **Email Address**.
- b. Enter your **Password**.
- c. Click **Sign In**.



Bentley

Sign In
Access your Bentley Services

Email

haaziq.forney@bentley.com

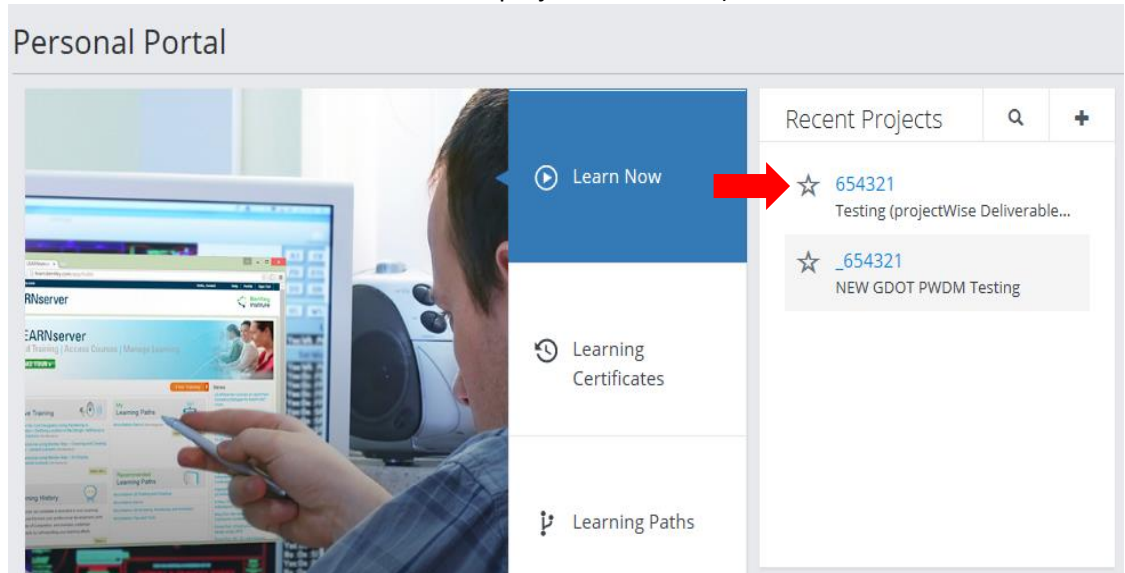
Password

[Forgot password?](#)

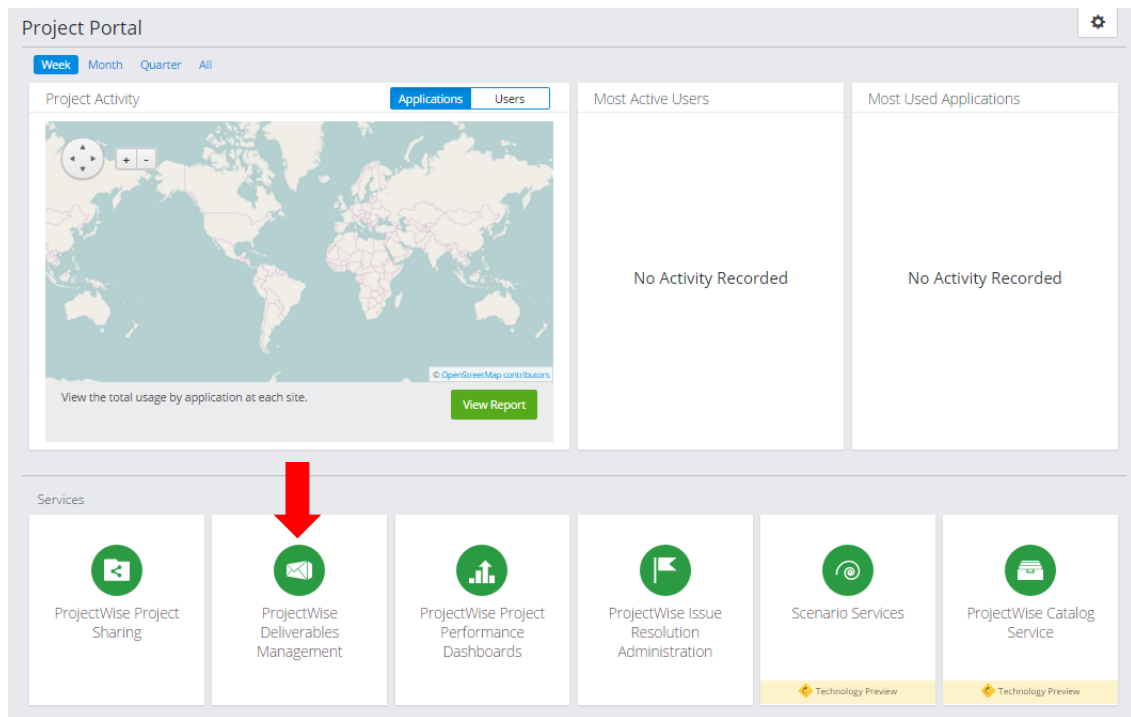
[Sign In](#)

Don't have a profile? [Register](#)

2. You will be taken to the **Personal Portal**
3. From **Recent Projects**, select which CONNECTED project you want to access.
4. Click on the project to be taken to the project portal. (If the project does not appear, simply click on the Search icon to search for the project PI number.)

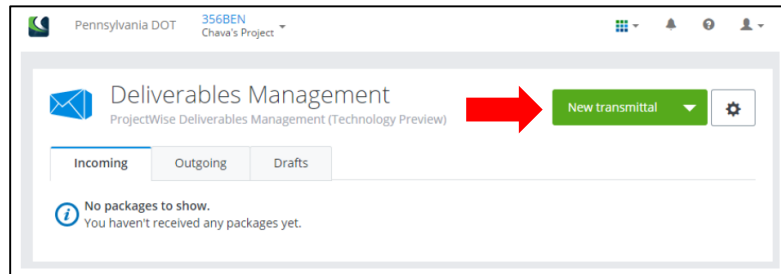


5. From the **Project Portal**, click on the **ProjectWise Deliverables Management** module.



6. You are now ready to start exchanging deliverables with project participants of this project.

7. In the Deliverables Management dashboard, click **New Transmittal**.



8. The transmittal draft form opens.

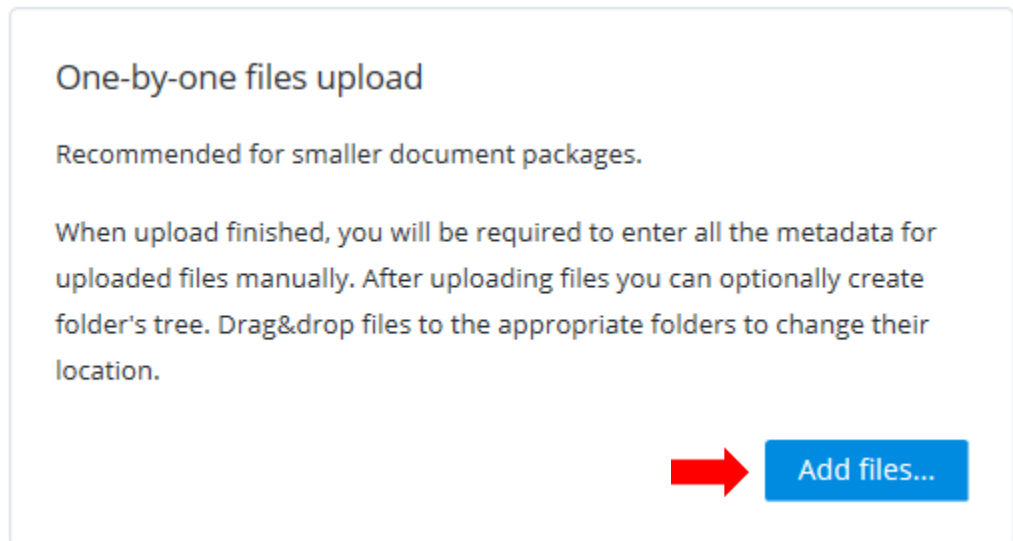
9. On the **General** tab, enter the following:

- a. **Subject** – EDG QA Check
- b. **Purpose** – Review
- c. **Comments** - Provide an overall comment about the package (Optional).
- d. **Cover Letter** – Either leave the default cover letter or select one from list (Optional).

10. On the **Recipients** tab, select which project participant you want to send this transmittal to. (Typically only one recipient is selected for an organization as a single point of contact and then they can send to other personnel within their organization for review if necessary.)

- a. Select **Add recipients**.
- b. Select **Show Internal** to view internal recipients or **External** to view external recipients.
- c. Click on a recipient, click **Add Selected**.
- d. Select **Ack** or **Resp** to require recipient to acknowledge or respond or both.
- e. Enter a comment for the recipient (Optional).

11. On the **Documents** tab,
 - a. Click on **Add files...**



- b. Select the desired files and click on **Open**.

NOTE: Both DGN files and PDF plan files are required to be submitted for EDG QA Checks.

12. On the **Scheduling** tab,
 - a. **(OPTIONAL) Select an Issue Date** – Date you want the package issued to the recipient
 - i. Set reminder date to be reminded to issue the package.
 - b. **Select an Acknowledge Date** – Date you want the package acknowledged by recipient
 - i. Set reminder date to notify recipient to acknowledge package.
 - c. **Select a Response Due Date** – Date you want to receive response from recipient
 - i. **Days after issue = 21**
 - ii. Set reminder date to be reminded to issue package.
13. To issue transmittal package, select **Issue** from the bottom of the dialogue box and then **Confirm**.